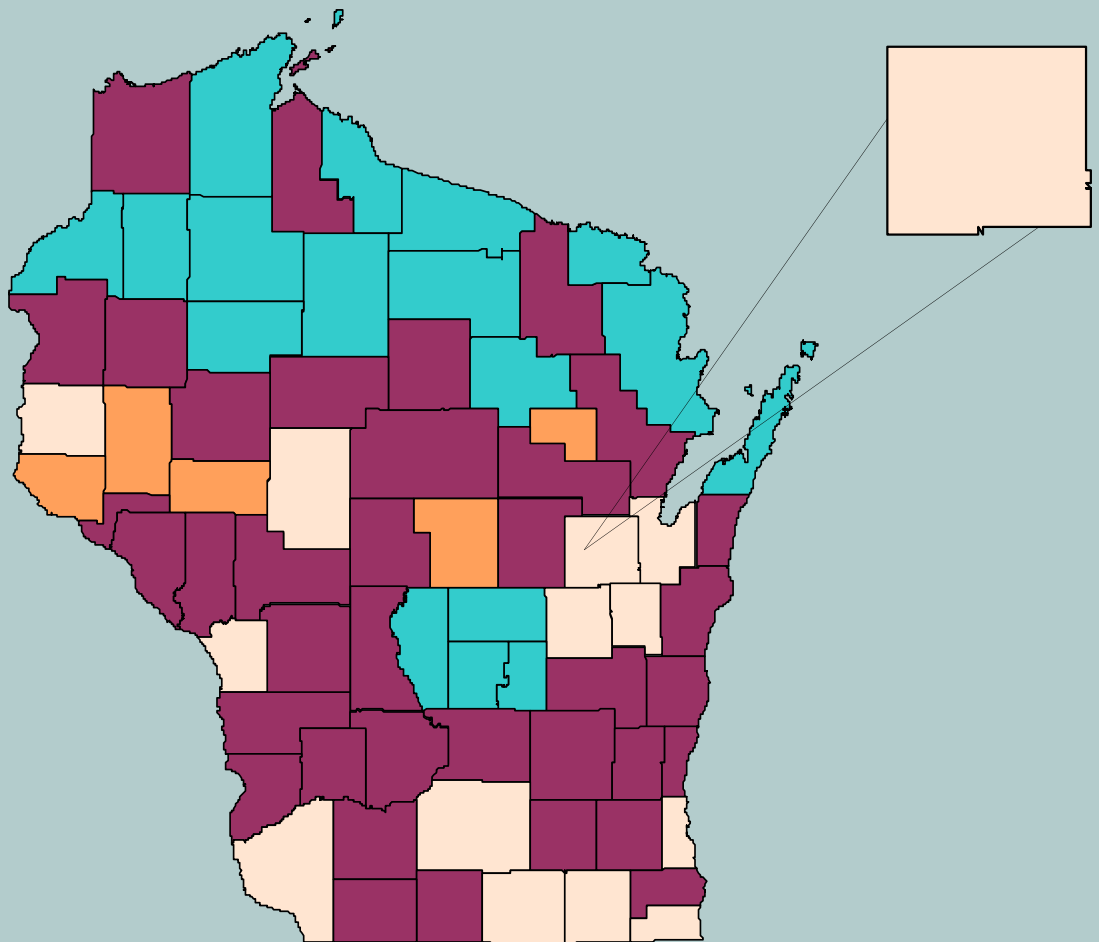


# Outagamie County Workforce Profile

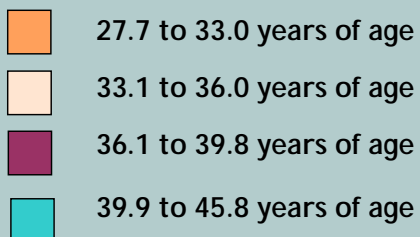
Median Age by County, 2000



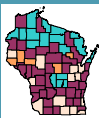
Your complete  
guide to the  
state of the  
labor force of  
today and a  
glimpse into  
the economy of  
tomorrow.



State of Wisconsin  
Department of Workforce Development  
October 2002



Source: Census 2000 of the United States



## County Population

The Outagamie County population continued its pattern of significant growth over the course of the past year, growing by 1.2% in 2001. This rate of growth surpassed both the state and national growth rate of 0.7%. This addition of nearly 1,900 new residents in the county continues a period of growth over the course of the 1990's when Outagamie County grew by 13.8%, adding over 19,000 residents to its population.

Looking at the county from a more regional perspective, Winnebago County is considered to be a part of the Appleton-Oshkosh-Neenah, Wisconsin Metropolitan Statistical Area (MSA), as defined by the United States Bureau of Economic Analysis. This MSA, which includes Calumet, Outagamie, and Winnebago Counties added 43,244 new residents over the course of the past decade for a decennial growth rate of 13.7%. Outagamie County grew at a relatively slower pace than Calumet County's 16.9% growth rate, but grew more rapidly than Winnebago County, who experienced a 11.1% growth rate over the decade. However, these rates alone are misleading, as the absolute growth in Outagamie County's population is nearly 7,000 residents greater than that of Winnebago and Calumet

County combined. This has cemented Outagamie County's position as the dominant county in the metropolitan area as development in the region has been focused in the northern and eastern areas of the region.

In analyzing the substantial period of growth that the county has progressed through in the 1990's, one interesting pattern to examine is the growth of the county's housing stock. Between 1990 and 2000, 13,144 new housing units were built in the county, presently accounting for 21.0% of the county's housing stock. When comparing the total number of units in 1990 to that in 2000, we see that the county's housing stock increased by a slightly smaller amount, 20.6%, suggesting that nearly all of the units constructed represented additions over the existing housing stock. In comparison, Calumet County added 26.4% to its housing stock, and Winnebago County's housing stock grew by 15.3%, again suggesting that the direction of new development patterns in the metropolitan area is focused both in Outagamie and Calumet Counties.

Another interesting facet of changes to the Outa-

*(Continued on page 2)*

### Total Population

	2000 Census	January 1, 2001 Estimate	Percent change
United States	281,421,906	283,474,000	0.7%
Wisconsin	5,363,675	5,400,449	0.7%
Outagamie County	160,971	162,833	1.2%

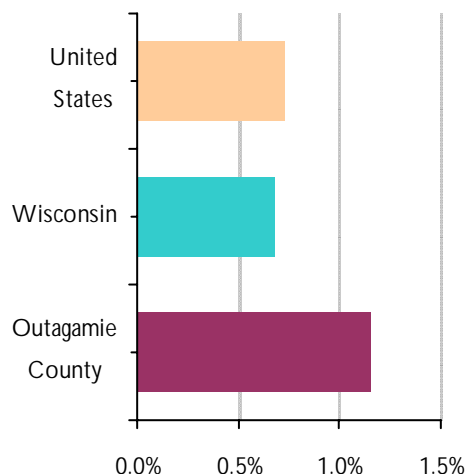
### Ten Largest Municipalities

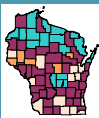
Appleton, City *	58,301	58,674	0.6%
Grand Chute, Town	18,392	18,739	1.9%
Kaukauna, City	12,983	13,071	0.7%
Little Chute, Village	10,476	10,526	0.5%
Greenville, Town	6,844	7,017	2.5%
Kimberly, Village	6,146	6,202	0.9%
Buchanan, Town	5,827	6,177	6.0%
Freedom, Town	5,241	5,308	1.3%
Oneida, Town	4,001	4,017	0.4%
Seymour, City	3,335	3,341	0.2%

\* Outagamie portion only

Source: Wisconsin Department of Administration, Demographic Services, 2002

### Population Growth 2000-2001

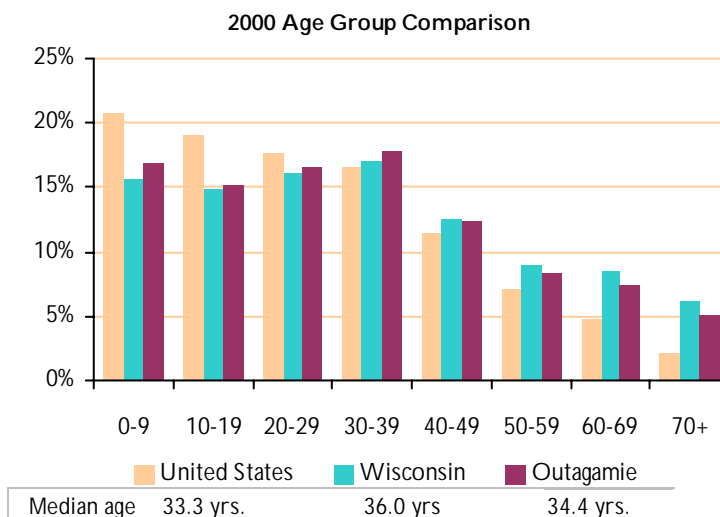




## State of Wisconsin - Outagamie County

Outagamie County population is that a significant share of the county's population has changed residences, either within the county or from elsewhere since 1995. According to information from Census 2000, 41.3% of the county's population responded that they lived at a different residence in 2000 than in 1995. Of that relatively large percentage, 22.5% moved from somewhere within Outagamie County, 13.2% moved from another county in Wisconsin, and 5.6% moved from elsewhere in the country. While the percentage of those moving into the state to take advantage of the career opportunities in Outagamie County is relatively modest, the rate of migration into the metropolitan area is greater than that of the state, as a whole.

Another interesting facet of the county's population is the distribution of the population by various age groups. In 2000, the median age of Outagamie County's residents was 34.4 years, which is significantly younger than the median age of Wisconsin of 36.0 years, but is somewhat older than the national median age of 33.3 years. From the distribution to the right, the reason for the relatively young population of the county is apparent. The percentage of

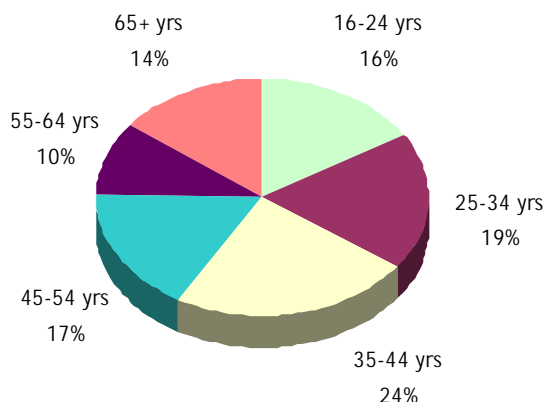


Source: US Department of Commerce, Census Bureau, *Census 2000*

the population under the age of forty is higher in Outagamie County than in the state in every age cohort, and nears the national distribution in the 20-29 and 30-39 age cohorts. While the percentage of children in the county is less than the representation in the national population, there is a good reason to expect that this percentage will increase, given the heavy concentration of persons between the ages of 20 and 40 in the county. Additionally, the county's elderly population is relatively low.

## County Civilian Labor Force

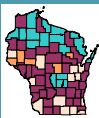
**Outagamie County Labor Force Age Groups**



Source: US Dept. of Commerce, Census Bureau, *Census 2000*

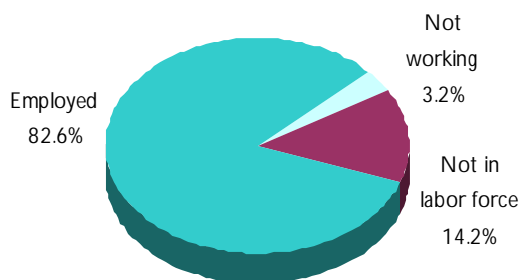
The impact of a relatively young population on future prospects for the Outagamie County workforce is significant. While not readily apparent in the preceding discussion, the pie chart to the left shows the distribution of the county's labor force eligible population by broad age cohorts. The first and most significant conclusion that can be drawn from this distribution is that a great majority of the population (59%) is below the age of 45. While this may be of relatively minor significance now, within the next twenty years, this young population will move through the mature, and most productive years of their working lives. While demographic factors in the state, as a whole have suggested that a potential labor shortage looms in the future as the number of workers entering the workforce is insuf-

(Continued on page 3)



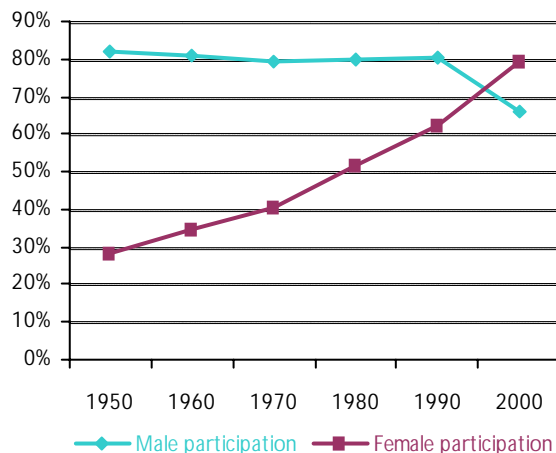
## State of Wisconsin - Outagamie County

### 2001 Labor Force Participation



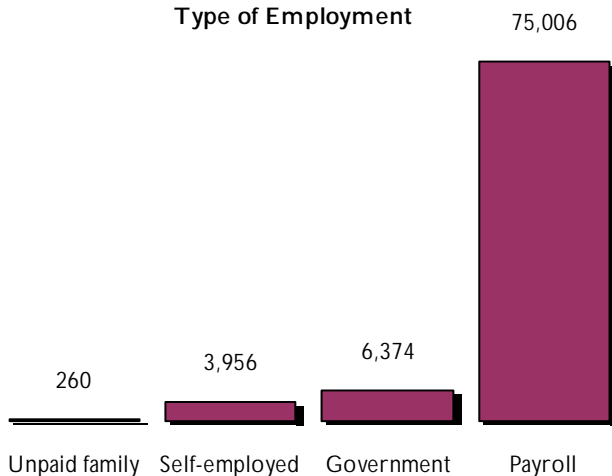
Source: Estimated from WI Dept. of Administration population estimates, Jan. 2001, US Census Bureau, and WI Local Area Unemployment Statistics.

### Labor Force Participation of Male and Female Residents



Source: US Dept. of Commerce, Census Bureau, *Census 2000*

### Type of Employment



Source: US Dept. of Commerce, Census Bureau, *Census 2000*

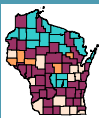
efficient to replace those retiring, this will not be the case in Outagamie County, suggesting that future growth in the county is sustainable for the near term.

The labor force is the sum of those employed and unemployed *that have actively sought work in the last month*. **Labor Force eligible must be 16 years or older and not a member of an institutional population** such as a prison or an armed forces member living on a military base. The term "unemployed" does not necessarily include all people who are not working. For example, those who are retired or choose not to work are not considered unemployed. The phrase "Not Working" in the graph below assumes unemployed for the purposes of this profile.

The Outagamie County labor force participation rate in 2001 was 85.8%, an increase of 0.6% over 2000. In comparison, the state's labor force participation rate was 73.5%, or 0.7% higher than 2000, while the nation's labor force participation rate declined by 0.3% in 2001 and was reported as 66.9%. The substantially higher labor force participation rate in Outagamie County is a function of a number of different factors. The high rate can be attributed to the presence of the county in the Fox River Valley. The region has experienced a period of significant employment growth over the past decade, leading to new opportunities. In addition, the presence of a large population of younger workers factors into the high rate as younger workers have a greater propensity to be active in the labor force than older workers who are either retired or approaching retirement.

Another trend worth noting when looking at the population's participation in the labor force is the divergent pattern of growth experienced by the male and female labor force over the course of the past fifty years. According to data collected from the decennial census for each of the past five decades, the male labor force participation rate remained relatively stable from 1950 to 1990, hovering around 80%. However, over the course of the past decade, male participation in the county's labor force has decreased significantly. This is a result of a number of factors.

(Continued on page 4)

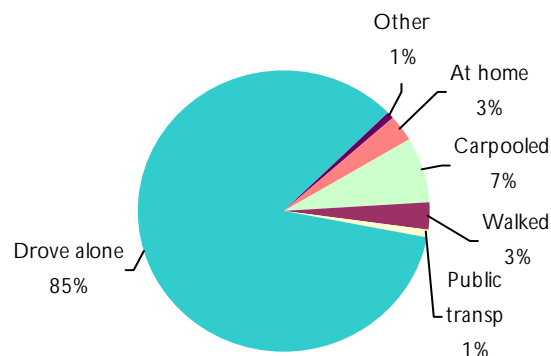


## State of Wisconsin - Outagamie County

Perhaps the most significant factor leading to a decline in the male labor force participation rate has been the exponential increase in the female labor force participation rate. While the variety of social and economic factors leading to a greater presence of women in the workforce have been discussed in a number of media, the disparity between male and female labor force participation over the past decade can be attributed primarily to increasing industry diversification in the county's economy, with growth moving away from traditional, male-dominated industries, such as manufacturing. Also, while employment growth has been significant, the rate of growth over the course of the past decade has been slower than the increase in the female labor force participation rate. Therefore, due to increased competition, a certain degree of "crowding out" has occurred in the labor force, leading to a decline in the male labor force participation rate.

Another important factor to consider when examining the labor force of any county, and particularly that of a heavily interconnected metropolitan county, such as Outagamie County is the commuting patterns of the county's workforce. While spe-

County Travel-to-Work Patterns

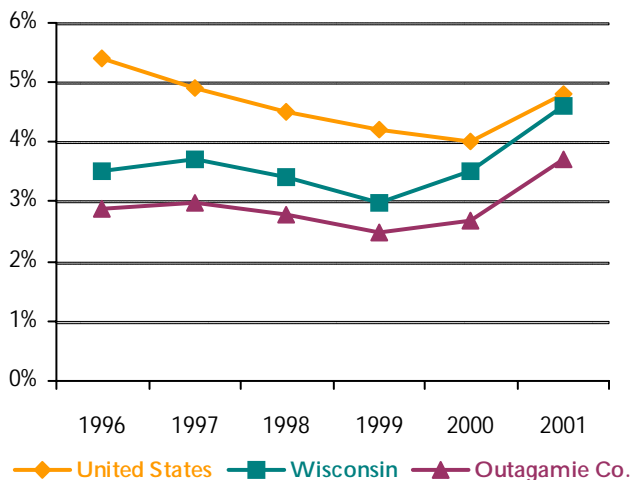


Source: US Dept. of Commerce, Census Bureau, *Census 2000*

cific commuting pattern information will not be made available until later this year, a basic calculation of the disparity between employed labor and available jobs suggests that, at a minimum, 3,100 workers commute outside of the county on a daily basis. However, given the presence of a significant number of workers commuting into the county from other counties in the region, the actual commuting base is significantly higher. Given the presence of a well-developed freeway bypass system connecting Highways 10, 41, and 441, a great majority of commuting workers (92%) either drive or carpool to work on a daily basis. This percentage is similar to that seen in both of the other metropolitan counties.

Moving briefly to a discussion of the unemployed labor force of the county, the trend analysis to the left shows the fluctuations in the annual unemployment rate in the county, state and nation between 1996 and 2001. Due to a similar industry composition, the Outagamie County annual unemployment rate has followed a similar pattern as the state. However, due to a higher degree of industry stability, the county rate has remained significantly lower than either the state or nation, reaching a high mark of 3.7% in 2001.

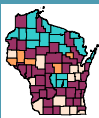
Unemployment Rate Comparison



Outagamie County Civilian Labor Force Data

	1996	1997	1998	1999	2000	2001
Labor Force	100,000	100,800	101,500	99,800	102,300	104,300
Employed	97,100	97,800	98,700	97,300	99,600	100,400
Unemployed	2,850	3,070	2,800	2,490	2,710	3,910
Unemployment Rate	2.9%	3.0%	2.8%	2.5%	2.7%	3.7%

Source: WI Department of Workforce Development, Local Area Unemployment Statistics, revised March 2002



## County Industry Employment

### Nonfarm Wage and Salary Employment

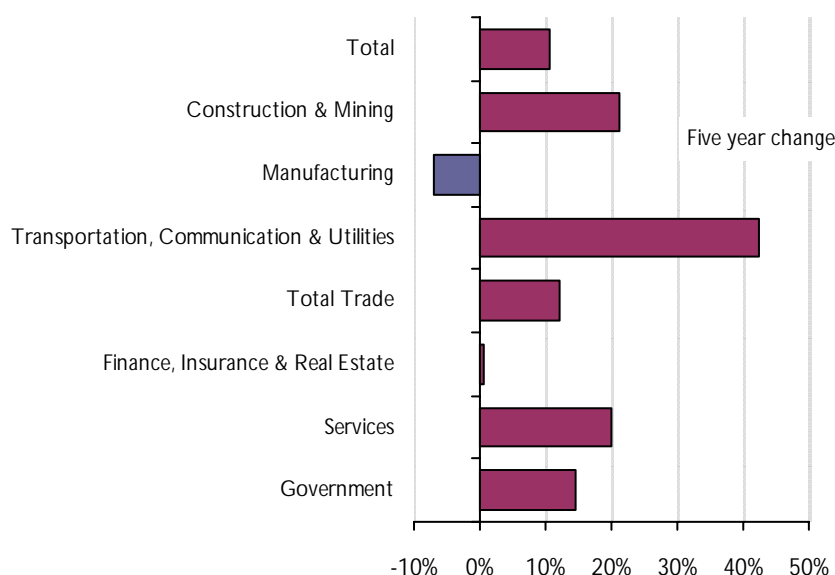
	1996	1997	1998	1999	2000	2001	Percent change	
							1 year	5 year
<b>Total</b>	91,465	93,390	93,600	95,457	98,722	101,206	2.5%	10.6%
<b>Goods Producing</b>	28,680	28,391	27,120	28,034	29,353	28,503	-2.9%	-0.6%
Construction & Mining	6,607	6,510	6,623	7,244	8,105	8,001	-1.3%	21.1%
Manufacturing	22,073	21,880	20,498	20,790	21,248	20,502	-3.5%	-7.1%
Durable	7,207	7,014	7,155	7,132	7,320	6,861	-6.3%	-4.8%
Nondurable	14,866	14,866	13,342	13,658	13,928	13,641	-2.1%	-8.2%
<b>Service Producing</b>	62,785	65,000	66,480	67,423	69,369	72,703	4.8%	15.8%
Transportation, Communications & Utilities	3,957	4,064	4,295	4,689	5,251	5,632	7.2%	42.3%
Total Trade	22,545	22,847	23,481	23,333	23,863	25,268	5.9%	12.1%
Wholesale	4,601	4,677	4,609	4,757	5,046	5,154	2.1%	12.0%
Retail	17,943	18,170	18,872	18,575	18,817	20,114	6.9%	12.1%
Finance, Insurance, and Real Estate	6,249	6,458	6,405	6,077	6,138	6,280	2.3%	0.5%
Services & Misc.	21,029	22,558	23,043	23,934	24,502	25,216	2.9%	19.9%
Total Government	9,006	9,073	9,256	9,391	9,614	10,307	7.2%	14.4%

Source: WI Department of Workforce Development, Nonfarm wage and salary estimates, revised March 2002

Changes in industry employment in Outagamie County over the past year bucked the prevailing trend of decline observed in the state and nationally, for the most part. The primary industry group affected by the most recent economic downturn was the manufacturing sector, which has experienced a sustained period of decline in the county

over the past five years. In 2001, durable goods manufacturers reported a greater job loss than nondurable manufacturers. However, over the course of the past five years, decline in nondurable goods employment, which includes employment in the paper industry has nearly doubled the loss of jobs in durable goods manufacturing. Additionally, construction employment decreased slightly, but remains at levels significantly above those observed five years ago.

### Employment Change by Industry Division: 1996 to 2001



Source: WI DWD, Nonfarm wage and salary estimates, revised March 2002

Among the industries reporting the most significant gains in 2001, both transportation, communications and utilities and government employment increased by 7.2%. The increase in government employment has occurred primarily in education. Similarly, the retail sector in the county continued a pattern of phenomenal growth, increasing by 6.9%, primarily as a result of new store openings on the east side of Appleton.

Over the past five years, the transportation, communications, and utilities, construction and mining, and service sectors have experienced the most rapid employment growth in the county.



## State of Wisconsin - Outagamie County

### Top 10 Employers

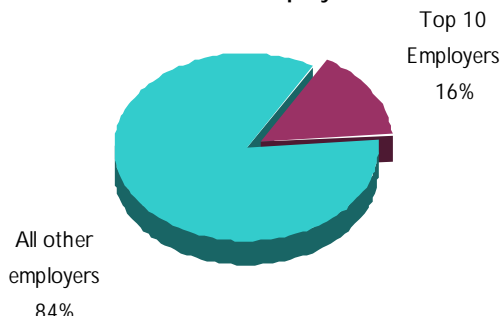
Company	Product or Service	Size
Thedacare Inc.	General Medical and Surgical Hospitals	1,000+
Appleton Area School Dist	Public School System	1,000+
Aid Assn For Lutherans	Insurance Services	1,000+
Sara Lee Corp.	Meat Processing	1,000+
Appleton Papers Inc.	Coated Paper Production	1,000+
Fox Valley Technical College	Technical College System	1,000+
Anchor Food Products Inc.	Frozen Food Products	1,000+
Wal-Mart Associates Inc.	Department Stores	1,000+
Miller Electric Mfg Co	Welding Machine Manufacturing	1,000+
County of Outagamie	County Government Services	1,000+

### Top 10 Industry Groups

Industry Group	March 2001		Numeric change	
	Employers	Employees	1-year	5-year
Health Services	218	6,876	1,090	1,129
Educational Services	30	6,572	279	1,051
Eating and Drinking Places	248	5,821	262	-272
Paper and Allied Products	29	5,744	-88	-90
Special Trade Contractors	393	5,657	279	2,101
Business Services	218	5,563	-498	934
Food and Kindred Products	26	4,877	-15	792
Industrial Machinery and Equipment	73	4,036	-77	164
Wholesale Trade-Durable Goods	233	3,508	18	523
General Merchandise Stores	17	3,247	505	778

\*data suppressed to maintain confidentiality

Top 10 Employers' Share of  
Nonfarm Employment



Top 10 Industry Group Share  
of Nonfarm Employment



Source: WI Department of Workforce Development, ES-202 file tape, December 2001

The list of the top ten employers in Outagamie County reflects the county's service-driven economy, which marks a significant departure from the traditional foundations of the county. This is evident by the fact that only two "traditional" manufacturing firms — Appleton Papers and Miller Electric Manufacturing are among the top employers in the county. Additionally, two food processing firms, Sara Lee and Anchor Food Products are

among the top ten employers. However, these firms, by and large, are neither traditional or non-traditional. Other top employers, such as Thedacare, Aid Association for Lutherans, Fox Valley Technical College, and Wal-Mart stores represent the significant presence of service, healthcare, and retail-oriented firms in the county.

(Continued on page 7)





## State of Wisconsin - Outagamie County

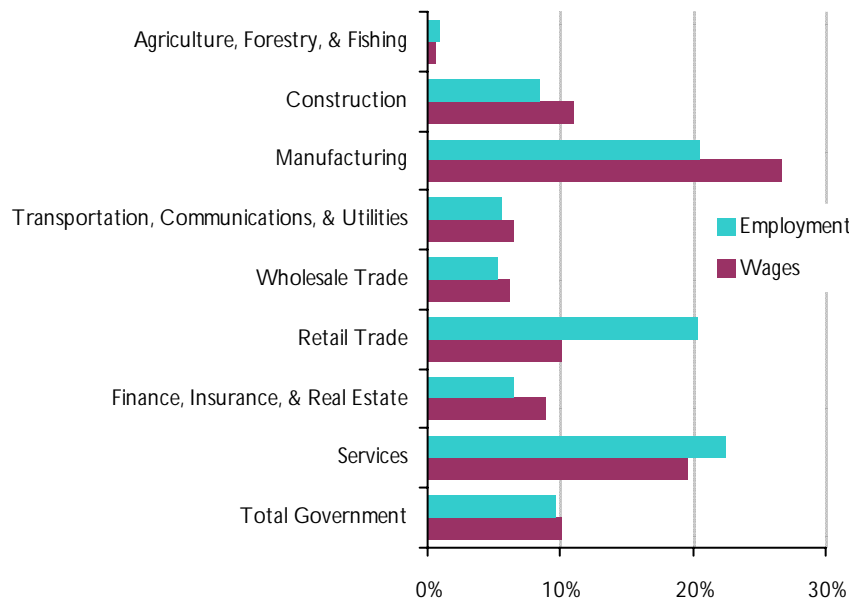
Additionally, an analysis of the top ten industry sectors in the county enhances this conclusion. The top three industry sectors in Outagamie County — health services, educational services, and eating and drinking places could all be considered “non-traditional.” In fact, of the top ten industry sectors, only three — paper and allied products, food and kindred products, and industrial machinery and equipment could be considered traditional manufacturing firms.

The dominance of the top employers and industry sectors is obvious as 16% of the resident workforce is employed by one of the ten largest employers and 51% of the workforce is employed by one of the ten largest sectors.

Another vital facet of the county's economy that has a significant impact on the county's workforce is the wages paid by employers in the county. In 2001, the average annual wage paid by employers in Outagamie County was \$31,707, which was 2.5% above the state average. While this average wage is lower than the \$34,586 average for Winnebago County, which is the highest average in the metropolitan area, the disparity among various industry sectors is much less in Outagamie County than its southerly neighbor. This indicates a greater degree of stability in wage structures in Outagamie County.

Among the industry sectors with the highest average wages construction employers pay 5.4% more than state-wide averages. Similarly, retail wages are 7.9% above the state average and finance, insurance and real estate average wages are 4.8% higher. Manufacturing wages remain 3.9% higher than the state.

**Employment & Wage Distribution by Industry Division**



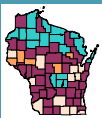
**Annual Average Wage By Industry Division**

	Outagamie Co. Annual Average Wage	Wisconsin Annual Average Wage	Percent of State Average	1-year percent change	5-year percent change
All Industries*	\$ 31,707	\$ 30,922	102.5%	3.0%	19.8%
Agriculture, Forestry, & Fishing	\$ 23,144	\$ 22,565	102.6%	5.4%	19.3%
Construction	\$ 41,132	\$ 39,011	105.4%	3.6%	20.5%
Manufacturing	\$ 41,291	\$ 39,739	103.9%	4.8%	19.4%
Transportation, Communications, & Utilities	\$ 36,763	\$ 36,639	100.3%	-1.2%	13.9%
Wholesale Trade	\$ 37,136	\$ 40,521	91.6%	1.1%	14.6%
Retail Trade	\$ 15,748	\$ 14,596	107.9%	2.1%	22.4%
Finance, Insurance, & Real estate	\$ 42,894	\$ 40,933	104.8%	0.9%	26.1%
Services	\$ 27,694	\$ 28,775	96.2%	8.7%	29.5%
Total Government	\$ 32,959	\$ 33,785	97.6%	1.4%	13.4%

\* Mining excluded from table since wages were suppressed to maintain confidentiality in every county

Source: WI DWD, *Employment, Wages, and Taxes Due covered by Wisconsin's U.C. Law, 2002*





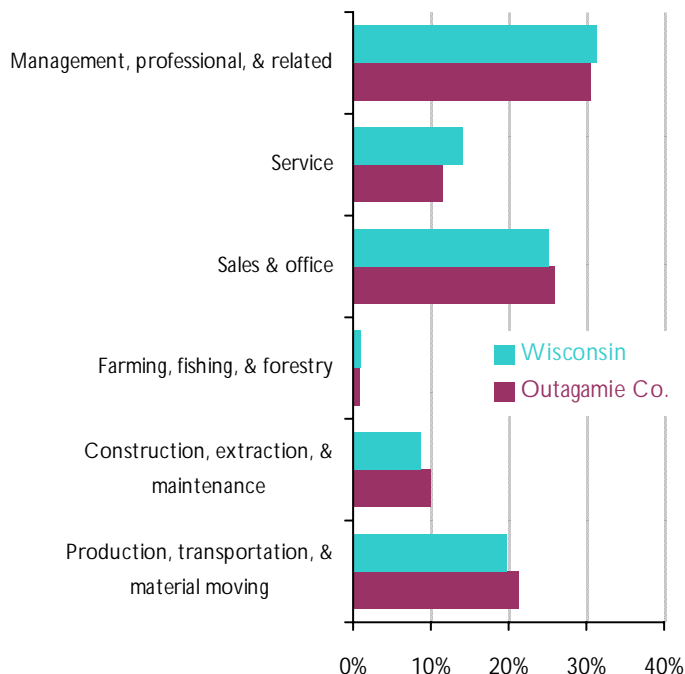
## Occupation and Education Characteristics of County Population

Two more factors that play an important role in defining the Outagamie County workforce are the occupational distribution and educational attainment of the labor force. Both of these again suggest a high level of economic prosperity and stability in the county.

From the occupational distribution illustrated in the chart to the right, we see that Outagamie County has a higher percentage of workers engaged in production, transportation, and material moving occupations than the state. This seems relatively surprising, given the pattern of decline of manufacturing employment in the county over the past five years. However, employment in the transportation, communications, and utilities sector has also increased substantially over the same period. It is also important to note that this distribution represents occupations only and is not representative of any one industry as an occupational classification may span a number of different industries, and vice versa. With this caveat, the presence of a high percentage of "white collar" workers in management, professional, service, sales, and office positions is indicative of the county's service-oriented economy. Employment growth in these industries also suggests that future occupational shifts will move towards professionally-oriented occupations.

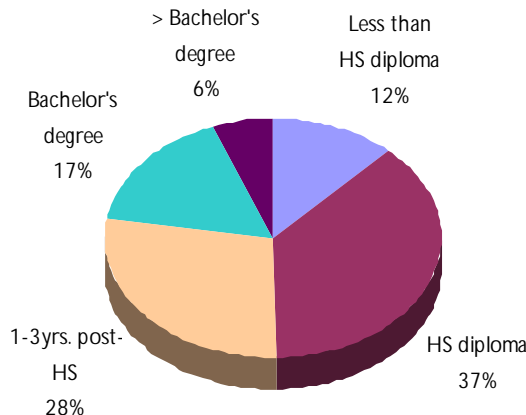
As the occupational distribution sharpened the ser-

Employment by Occupation Group: 2000



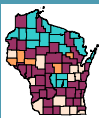
US Department of Commerce, Census 2000

Education Attainment in 2000



Source: US Dept. of Commerce, Census Bureau, *Census 2000*

vice-oriented image of the Outagamie County economy, the educational attainment of the county's population provides a bridge between the county's "old" and "new" economy. The distribution on the left represents the educational attainment of the county's population aged 25 and above by the highest level of education completed. The relatively high percentage of persons with a high school diploma is typically indicative of an economy with a heavy emphasis in traditional, manufacturing and other "blue collar" industries. Additionally, the significant percentage of the population that has completed between one and three years of education beyond high school is significant. While this distribution does not include distinctions for associate's or vocational degrees as a number of professional development programs do not result in the awarding of a degree, the presence of an extensive technical college system such as Fox Valley Technical College and the UW-Fox Valley campus certainly boosts this percentage. Finally, given the transitions within the county's economy, one would expect the number of college-educated workers to rise.



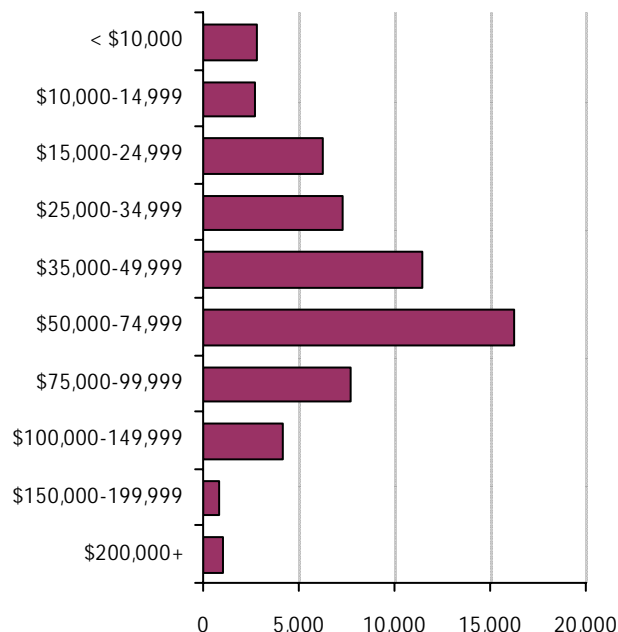
## County Income Information

A final factor that provides some indication of the relative health of the county's economy and work-force is the income level of the county's population. There are a number of different methods that are commonly used to measure the relative wealth of the county's population. The most popular method is through the calculation of the county's median household income.

In 2000, the median household income of Outagamie County was \$49,613. While Calumet County's median household income of \$52,569 was the highest in the metropolitan area, the Outagamie County median figure is significantly higher than the state median income of \$43,286. Additionally, the Outagamie County median is higher than the Winnebago County median of \$44,445. The high income level can be attributed primarily to the high wages paid by employers in the county. However, the median income lags behind that of Calumet County primarily because of the differences in population between the two counties. As a result, Outagamie County naturally has a higher number of low income households than does its easterly neighbor.

In order to measure the impact of these low income households, the percentage of those living in poverty is useful. In 1999, 2.9% of families, 4.7% of individuals, and 13.2% of single mother families lived

**Households by Income Range**  
Median household income in Outagamie Co. \$49,613

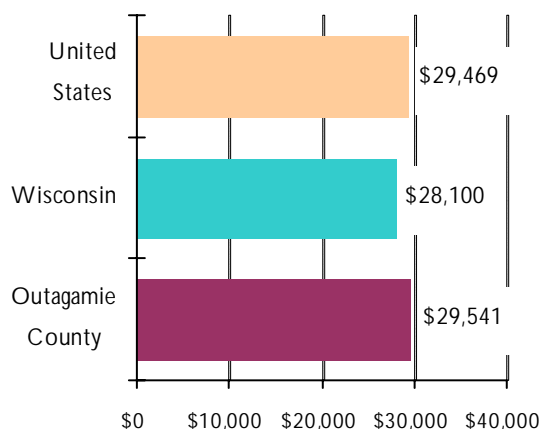


Source: US Dept. of Commerce, Census Bureau, *Census 2000*

in poverty.

A final measure of income commonly used is per capita personal income, or PCPI. In 2000, the PCPI of Outagamie County was \$29,541, which was higher than both the state and national figures, again restating the relative prosperity of the county.

**Per Capita Personal Income 2000**



Source: US Department of Commerce, Bureau of Economic Analysis

**Components of Total Personal Income: 2000**

